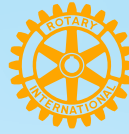


Rotary
Clubs of Livermore
& Livermore Valley



**Rotarian
Foundation
of Livermore**

REPORT TO OUR LIVERMORE VALLEY COMMUNITY

2019-2020

Common + Unity = Community

The Rotarian Foundation of Livermore (RFL) was founded in 1987 to enrich the Livermore Valley through tax-exempt charitable outreach. Today we have grown into over a \$1.7 million sustainable enterprise to promote the common good--uniting us in growing a healthy community.

As a public charity, the Foundation marshals contributions, fundraisers, corporate sponsorships, bequests, and professionally managed investments to support charitable organizations already in our community and develop independent charitable initiatives as well.

Specifically, the Foundation employs community grants to:

- 1) Create opportunities for young people;
- 2) Promote community service;
- 3) Foster original ideas for new outreach;
- 4) Improve the quality of life for the Livermore Valley community.

We are a hands-on philanthropy where we can participate in the service, see its effects every day, and watch the growth that we nourish from year to year. We consider everyone who donates or uses Foundation funds to be part of the Foundation. Managed on a volunteer basis, our elected Board of Directors is composed of community and business leaders who are also members of the two Rotary clubs in town.

VISION: *We strive to sustainably improve the quality of life for all Livermore Valley residents.*

MISSION: *The Rotarian Foundation of Livermore awards grants on an annual basis that unleash the creativity, dedication, and spirit of our local community—underwriting Rotary projects that will leave a lasting positive impact on the Livermore Valley.*

We make the Livermore Valley a better place to live!





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Making HEADLINES

The Foundation AWARDED \$1,233,328 from 1999 to 2019 in annual community grants; in 2020, the annual total for grants was an all-time high of \$76,824.

The Foundation DONATED \$5,000 each in emergency funds to two nonprofit organizations in 2019–20: 1) Tri-Valley Haven for their annual holiday food distribution event and 2) Axis Health for a Covid-19 community healthcare response.

The Foundation ESTABLISHED its first scholarship this year to honor the late local businessman, sports enthusiast, and Rotarian Bill Geyer, who owned Trophies & Tees. The first scholarship recipient is Livermore High softball player Sara Morris. She will attend Las Positas College in the fall, planning for a career in medicine.

The Foundation SUPPLIED matching grants in the Innovation in Education Grants Program in 2020 – in partnership with the Livermore Valley Education Foundation.

The Foundation CONSTRUCTED the very popular downtown Rotary Community Bandstand for outdoor concerts at the Carnegie Park in downtown Livermore in 2016. Contractors and suppliers donated materials, the two Clubs provided labor, and cash donations totaled over \$125,000. Complementary landscaping is scheduled to be added in 2021.

The Foundation CREATED over the years a number of “restricted funds” for individual donations to specific Rotary Club projects.



Enriching OUR COMMUNITY THROUGH ANNUAL COMMUNITY GRANTS

The main thrust of the Foundation is to raise money to distribute annual grants in the Livermore Valley community. In 2020, we awarded \$65,022 in grants to 14 community organizations, plus \$10,000 in emergency grants. These grants will enrich our Livermore Valley communities, focusing on community service with an emphasis on youth activities. These grants varied up to \$5,000 each.

ANNUAL GRANTS

The organizations include (listed alphabetically):

- ▶ American Association of University Women: Scholarships for middle school girls to attend Tech Trek summer science camps.
- ▶ Arroyo Seco Elementary School: A new "Math for All!" program to reach all students at this K-5 school in Livermore.
- ▶ Assistance League of Amador Valley: Operation School Bell—School clothing needed by younger children.
- ▶ Harmony and Healing: Music to help patients in hospitals and other care homes to heal.
- ▶ Hope Hospice, Inc: "Living with Dementia"—Support program for patient care and family support.
- ▶ Livermore National Laboratory Foundation: "Girls Who Code BIG," camp for young women to inspire future scientists and engineers to pursue supercomputing.
- ▶ Livermore and Granada High Schools: Safe & Sober Grad Night program.
- ▶ Livermore Valley Joint United School District: Access to children's health services.
- ▶ Livermore Valley Performing Arts Center: Purchase of new audience chairs for the Bothwell Arts Center.
- ▶ Open Heart Kitchen: Weekend Bag Lunch program for children in the Livermore School District.
- ▶ Partners for Change—Tri-Valley: Program to learn weekly life skills.
- ▶ Sunflower Hill: An accessible planting station at a local residential community for individuals with special needs.
- ▶ Tri-Valley Conservancy: "Discovery - Youth in Nature Program" that connects kids to nature and science.
- ▶ Valley Veterans: Challenge grants for local veterans attending Las Positas College.

These 14 grants were distributed on April 29, 2020, through a Zoom Award Recognition Ceremony.

EMERGENCY GRANTS

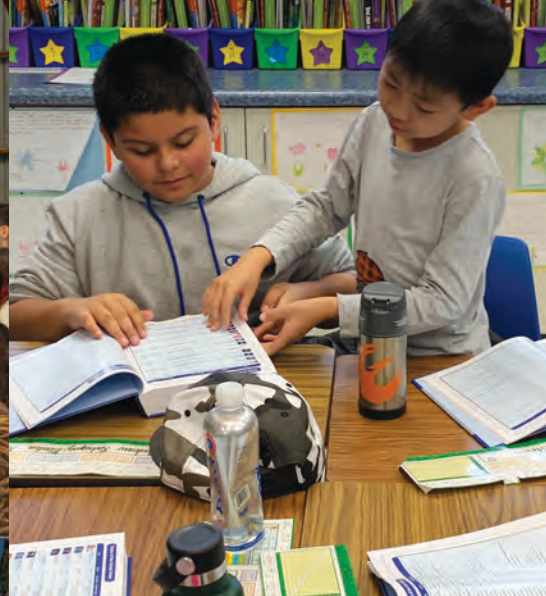
This past year the Foundation made two emergency grants to local nonprofits outside the normal grant process: 1) Tri-Valley Haven for a holiday food distribution event and 2) Axis Health for a Covid-19 community healthcare response. Each charity was awarded \$5,000 by the RFL

INNOVATION IN EDUCATION GRANTS

In partnership with the Livermore Valley Education Foundation (LVEF), we sponsored two grants for projects that "challenge the ordinary and are innovative in scope and application." Grants totaling \$3,604 (\$1802 from RFL) were awarded for:

- ▶ Multisensory teaching in first-grade classes at Rancho Las Positas Elementary and
- ▶ Development of a curriculum for use on smart phone apps for Livermore High School physics classes.

The total donation for all three types of grants in 2020 was \$76,824.



Reaching OUT TO OUR YOUTH

Every year Rotarians contribute to projects focusing on youth. This year we added our first scholarship to our annual Holiday Party and the yearly gift of new dictionaries to all Livermore third-graders. The new scholarship awards a high school youth active in sports and interested in a medical career.

FIRST ROTARIAN FOUNDATION SCHOLARSHIP HONORS BILL GEYER

In 2020, the Rotarian Foundation established a scholarship fund to honor late Rotarian and local businessman Bill Geyer for his many contributions to the Rotarian Foundation, the Rotary Club of Livermore, youth sports, and his community.

Each year the Bill Geyer Rotarian Foundation scholarship will be awarded for \$2,000 (\$1,000 per year) for two years. The scholarship winner must be a local high school graduate pursuing an education in the medical field—with priority to students that played baseball/softball or some other sport.

In this inaugural year, the scholarship was awarded to Sara Morris, a Livermore High School softball athlete. Sara plans a career in the medical field, starting at Las Positas College this fall.

Bill and his wife Dianna started Livermore Trophies & Tees in 1977, serving the local sports leagues and businesses. Bill served as a baseball coach, baseball umpire, basketball coach, plus softball and soccer player. He also volunteered with the Alameda County Sheriff's Search and Rescue, the Rotary Club of Livermore, and the Livermore Chamber of Commerce.

One of Bill's major accomplishments was to spearhead the funding and acquisition of a Mobile Health Unit (MHU) through the Rotarian Foundation, to be operated by ValleyCare Health (now also Stanford Health). The MHU provided easier access for people experiencing difficulty obtaining health care.



CHILDREN'S HOLIDAY PARTY SPARKLES

The line always starts very early with young children and their parents dressed in their holiday finery. Everyone is excited for the party!

In December, for the past four years, the Rotarian Foundation throws a big holiday party for pint-sized (ages 3–5) guests and their needy families. Last year we hosted our Holiday Party for approximately 125 children—from 75 very low-income families in Livermore. The Community Association for Preschool Education (CAPE) invites the children eligible by government income standards.

The fun-filled party includes varied activities for the children, a full meal for every child and parent, and gifts for each child. The meal is prepared and served by Rotarians with the help of youth from the culinary program at Del Valle Continuation High School. The children delight in the entertainment including a magician and face-painting. Santa Claus is on-hand to meet with each child—while parents snap photos.

Of special significance to the children and families are the special gifts/gift bags that each child receives—sweatshirts, children's socks, and gloves plus toys, games, and puzzles. Each preschooler also receives two books and a final going-home gift of two stuffed animals.

At the end of the afternoon, the families help with the clean-up. They delight in taking down the extensive holiday decorations at the party building and then “recycling” them to make their own homes more festive.

COLORFUL DICTIONARIES EXCITE THIRD-GRADERS

When you enter the classroom, you can hear the excitement of the students.... They know that they are going to get a fancy hardcover book to take home. For some children, it is the only book they will own; for others, the students are excited to have a dictionary just like their big brother or sister.

Every year since 2003, the Rotarian Foundation has purchased about 1,200 colorful, plentifully illustrated, hard-backed MacMillan dictionaries for all third graders in Livermore. Funds (\$2,000) also come from the Hindu Community and Cultural Center.

Then about four dozen Rotarians distribute the dictionaries in all third-grade classrooms and introduce the students to how to use a dictionary. These Rotarians give pep talks about how fun it is to use the dictionary and challenge the students to find different facts—mobilizing them to understand how a dictionary works and how much information it contains. Third-graders at St. Michael's School are also supplied with dictionaries.

In 2020, only about half of the 1,200 dictionaries were able to be distributed because of the shelter-in-place guidelines for the Covid-19 pandemic. Recently, the Foundation set up a Special Committee to get feedback on if the dictionaries are still useful and enjoyed by third-graders in this digital age.



--“I put my new dictionary in my backpack and bring it to school every day! It helps me learn faster!”

--“Wow! I think this dictionary will help me get even smarter!”





SCHOLARSHIPS ENCOURAGE ASPIRING YOUNG MUSICIANS

For over 20 years, RFL has provided annual scholarships to Livermore students who have an affinity for music and perhaps want to make it a career. Open to student musicians from sixth to twelfth grade, the scholarships--which range from \$200 to \$1000--can provide money to repair an instrument, purchase a quality instrument, buy music, take lessons, or any other music-oriented need. Members of the Music Scholarship Committee counsel the scholarship applicants on their music needs.

Early in 2020, the Music Scholarship Committee received applications from 24 young musicians. Using the Zoom process (because of the Covid-19 pandemic) the Committee awarded 15 scholarships. Typically the most outstanding high school senior receives a \$1000 scholarship. This past year two musicians earned these top awards: Austin Weinshelbaum, cello, and Morgan Rogge, voice.

The Committee uses teacher references in selecting the winners, as well as the student's application. The winners also perform at a Rotarian meeting. Funds for the scholarships come from benefit concerts and individual donations to a restricted fund.

According to Rotarian Michael Ferrucci, guitarist and former owner of a music store in downtown Livermore, "Many of our scholarship winners have gone on to become music teachers and professionals. Last year one of our former winners, now a professional pianist, came back to Livermore and headlined his own concert at the Bankhead Theater." Ferrucci founded the Music Scholarships program for Rotary.



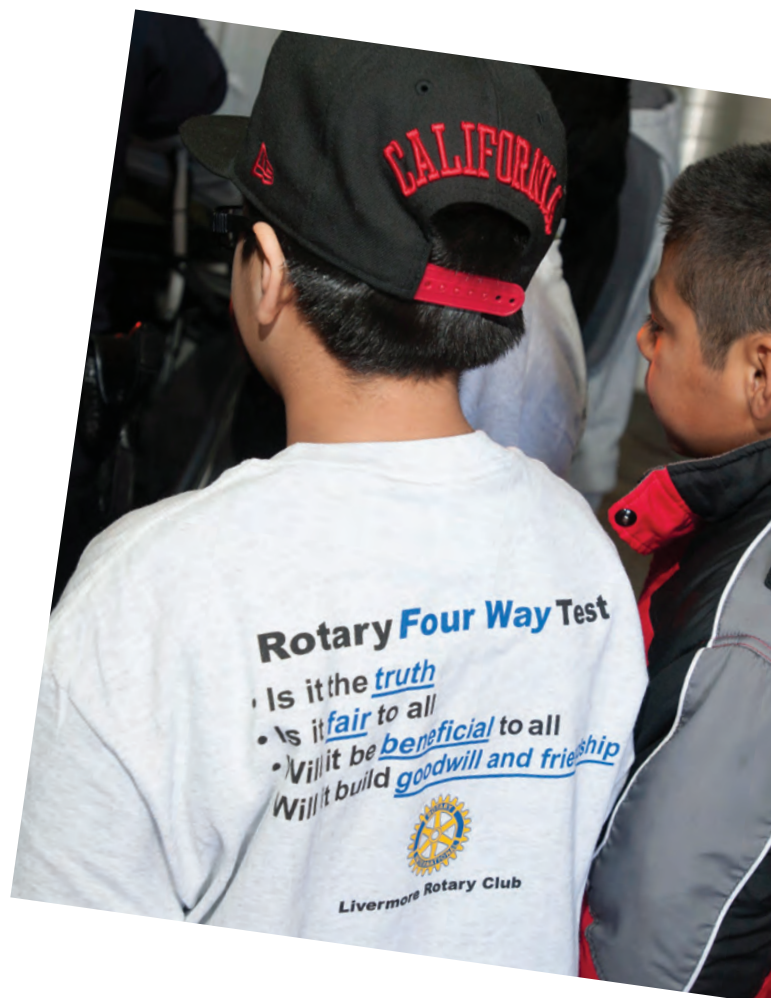
STEM SCHOLARSHIPS PROMOTE INTEREST IN TECHNICAL SUBJECTS

The Rotarian Foundation STEM (Science, Technology, Engineering, Math) Scholarships program is designed to sponsor disadvantaged middle school students in the Livermore Joint Unified School District. Through this sponsorship, students can attend summer camps or other short-term educational programs emphasizing these four technical fields. In 2017, the sponsorship funds were used for the first time to send 23 Migrant Education Program students (girls, grades 6–9) to participate in a field trip to the Tech Museum of Innovation in San Jose.

In 2020, the STEM scholarship funds provided to the school district to support an Outdoor Education STEM Camp could not be used because of COVID-19 restrictions. Therefore, now the school district is moving forward to use the funds for Foldscopes, as part of an online hands-on science education and challenge initiative. The science specialists are especially interested in how the program will work in this time of remote learning. For information on this under-one-dollar microscope and the world-wide community of users, check out the link:

<https://microcosmos.foldscope.com/>

The STEM Scholarship Fund, which started in 2015, originally focused on READY students in the outreach program by the Rotary Club of Livermore at Junction Avenue Middle School. It has since been expanded to other schools in the school district.



Generating FUNDS FOR OUR COMMUNITY OUTREACH

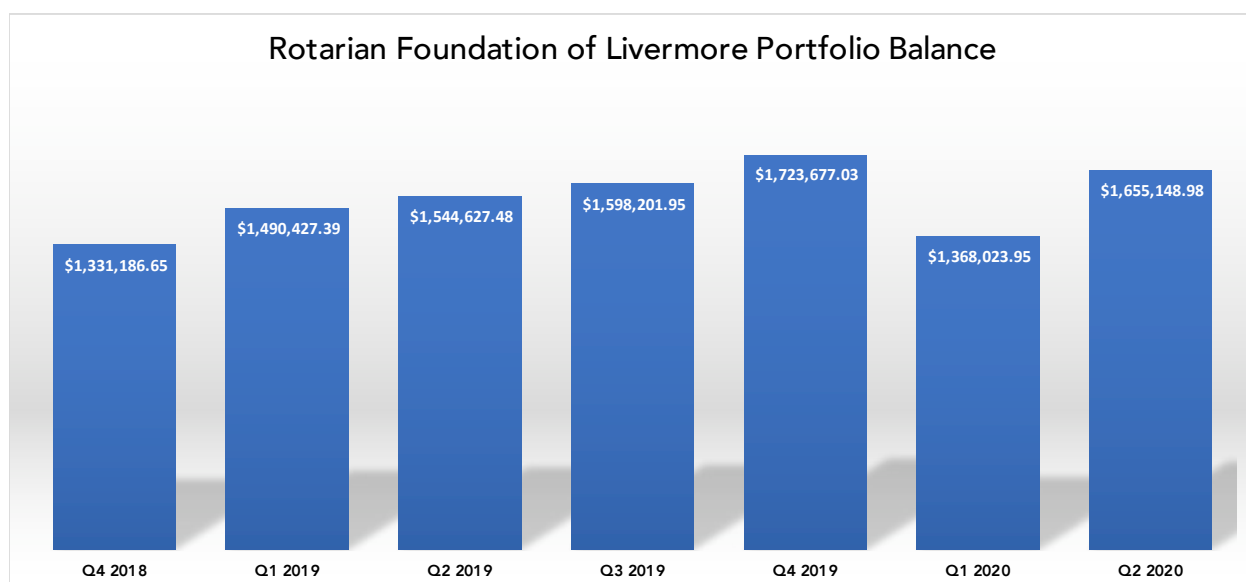
When the Rotarian Foundation of Livermore started in 1987, the plan was to raise enough money so that we would be able to make annual gifts of \$50,000 to local charitable organizations--forever.

In 2005, 18 years later, through the fundraising efforts of our two clubs (Rotary Club of Livermore and Rotary Club of the Livermore Valley), the Foundation hit its original goal of raising \$1 million to fund that purpose. The original plan was that the investment earnings on our accumulated funds, or *corpus*, would provide enough money to fund our annual gifts and the administration expenses of the foundation. The original investment would remain intact. The Foundation also raises funds for specific projects through directed donations to a group of restricted funds.

In the last five years, the Foundation's Board of Directors updated and clarified our strategy to provide those annual gifts. We changed our target gift amount to 4% of the value of the investment portfolio. In addition, we clarified that our goal for our investments is to get a long-term average return of 4% plus inflation so that the purchasing power of our gifts would keep up with inflation.

To meet our investment goals, we use a professional investment firm to advise us and have established a Foundation committee to provide oversight. In 2020, the amount in our corpus now totals over \$1.7 million.

Finally, every year we request donations from our individual Rotary Club members and community advocates in the fall Season of Giving. These monies are targeted for our special "Circle of Giving" program—and those who donate are honored at the Rotary Club meetings.



Planning FOR 2020-21

SPECIFIC GOALS FOR THE NEW FISCAL YEAR

- ▶ Select a specific Large Project (see below) for RFL Sponsorship in conjunction with the two Rotary clubs
- ▶ Assist the City of Livermore in constructing the Carnegie Park Landscape Project adjacent to the Rotary Bandstand
- ▶ Complete and distribute A Report to the Livermore Valley Community for Rotarians, city officials, and interested donors
- ▶ Evaluate the Dictionary Program and recommend next steps
- ▶ Agree to a process for serving selected charitable interests outside the Livermore Valley
- ▶ Establish a "Bequests page" to the RFL website - "Leave a Legacy"
- ▶ Improve/enhance Foundation communications with the two Rotary clubs

POTENTIAL LARGE PROJECTS

During the past fiscal year, the new Project Development Committee identified seven potential large projects to be evaluated for further action:

- ▶ Livermore Valley Joint Unified School District - Acquire Chromebooks for needy students performing distance learning in virtual classrooms.
- ▶ All's Well Theater - Shakespeare Theater for seventh graders.
- ▶ Black Box Theater - Regional center for the performing arts.
- ▶ Cultural Arts and Science Center Support Facility – New building to support the Livermore Opera, Livermore Shakespeare, and Quest, the new Livermore Science and Society Center.
- ▶ Little League Dugout – Underground dugouts at Granada Little League baseball fields for hosting the Little League International World Series.
- ▶ Mobile Exhibit for Livermore Science and Society Center - A mobile exhibit and associated science education program as part of the Livermore Science and Society Center.
- ▶ Vineyard 2.0 Housing – Interior amenities (e.g., laundry, showers, mailboxes, and/or lockers) to a housing project for the local homeless that will include Open Heart Kitchen, a Counseling Center and a Community Center at the proposed center on the corner of Chestnut Street and North Livermore Avenue in downtown Livermore.

NEW DONATIONS TO THE ROTARIAN FOUNDATION OF LIVERMORE CAN BE MADE ONLINE AT:

<http://www.rotarianfoundationlivermore.org>,

OR MAILED TO:

Rotarian Foundation of Livermore
P.O. Box 2181
Livermore, CA 94551-2181

ALSO, REMEMBER THE FOUNDATION IN YOUR ESTATE PLANNING AND WHEN MAKING BEQUEST DONATIONS.

TAX ID #: 94-3038645



Rotarian Foundation of Livermore